

**Request for Quotation
for
Community Leadership Mobilization
and Regional Economic Transformation**

The WorkPlace, Inc.
350 Fairfield Avenue
Bridgeport, CT 06604

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A. OBJECTIVE

The WorkPlace, Inc. is soliciting proposals from qualified consultants to assist in developing workforce and economic development strategies and resources for a long-term transformation of individuals and institutions into a coalition to address global competition at a regional level within southwestern Connecticut.

The selected consultant must be a multi-faceted strategist with the ability to contribute innovative ideas, serve as a process facilitator and assist in the implementation of regional transformation strategies.

B. INTRODUCTION

Global competition is typically seen as a national challenge. However, in reality the challenge must be addressed at a regional level, where companies, workers, researchers, entrepreneurs and governments come together to create a competitive advantage. To stay ahead of global competition, we must identify strategies to further integrate workforce development, economic development, and education systems at the regional level. To carry out the development and implementation of such strategies and to support President George W. Bush's broader Competitiveness Agenda, the United States Department of Labor (USDOL) announced the Workforce Innovation in Regional Economic Development (WIRED) initiative in February 2006.

WIRED is providing 13 regions across the country with funding and ongoing technical assistance and support to implement a transformational approach to their workforce and economic development systems at the regional level. To further emphasize the importance of regional of regional integration, USDOL added a second tier of participation under the WIRED initiative named WIRED Virtual Community of Regions. These 13 Virtual Communities will obtain access to technical assistance, resources and strategies being developed for the WIRED initiative to further the virtual region's economic strategies.

The WorkPlace has been awarded funding by USDOL as a WIRED Virtual Community.

The overarching goal of The WorkPlace's WIRED initiative is to transform Southwestern Connecticut's regional economy by enlisting the skills of regional partners to expand employment and advancement opportunities for workers and catalyze the creation of high-skill, high-wage job opportunities. The region should be empowered to implement groundbreaking strategies that will result in strengthening its workforce investment system, among other things, as a key component of a regional economic development strategy.

To achieve this goal, The WorkPlace will initiate a key Leadership Group that represents the region's assets. These include, but are not limited to:

- Colleges and universities
- Venture capital firms
- Economic development agencies
- Government and political leaders
- Community development agencies
- Entrepreneurs

- Private foundations
- A cross-section of the region's businesses
- Transportation providers that represent local and interstate travel
- The K-12 education system
- Technology organizations
- Faith-based organizations
- Other community leaders that share the philosophy of regional transformation

The Leadership Group will not respond to programmatic or legislative requirements, but will act as a dynamic social network working to identify key strategies and solutions that are developed collaboratively. The membership of this Group will understand that only a regional economy can amass all the necessary assets to compete globally, and that such regional collaboration fosters the innovation that leads to global competitive advantage.

The Leadership Group will be the region's change agent to transform mindsets, institutions, organizations and the individuals engaged in ensuring the competitiveness of southwestern Connecticut in the global marketplace.

Although the Group is initiated by The WorkPlace, it will develop its own identity, leadership and member roles. The WorkPlace will share in the support of the Group, along with other Group members, until it can achieve self-sufficiency.

C. BACKGROUND INFORMATION

The WorkPlace, Inc., based in Bridgeport, Connecticut, is a non-profit corporation that helps residents prepare for careers and strengthens the workforce for employers. As Southwestern Connecticut's Regional Workforce Development Board, it administers workforce development funds allocated by state and federal agencies and coordinates providers of job training and education programs that meet the needs of residents and employers in the 20 communities that comprise the Southwestern Connecticut Workforce Investment Area.

The mission of The WorkPlace, Inc. is to develop a well educated, well trained, and self-sufficient workforce that can compete in the changing global marketplace. Essential to our mission is the creation of a seamless, coordinated system of education, training and employment that is customer-centered and easily accessible; meets the needs both of employers for employable people and of persons who face barriers to the kind of employment that provides economic self-sufficiency; has a high level of commitment and collaboration from business, education, government and community agencies including economic development, employment and training, and human services; and has defined goals and performance standards.

D. SCOPE OF WORK

This Request for Qualifications is to engage a consultant to provide the services indicated below. The proposer must identify the types of services it will provide and activities it will conduct during the contract period. Also state how the project will be concluded to transition full responsibility to the Leadership Group.

The WorkPlace currently anticipates that the following tasks will need to be performed by the selected consultant in order to help us achieve our objectives:

- 1) Utilizing existing data, define the regional economy by
 - a) Identifying the areas in and surrounding southwestern Connecticut that share the same economic structure which may extend beyond the Virtual Community's geographic borders which is currently considered the Stamford/Norwalk and Bridgeport, Connecticut, labor market areas.
 - b) Determine the pros and cons to expanding the region beyond state borders into Westchester County, NY. Documentation of results required.
 - c) Analyzing data to determine if an interstate region would be best served with one workforce investment board. Documentation of conclusion required.
 - d) Mapping the region's assets, including:
 - Human capital (workforce)
 - Financial capital (including investment entities, venture capitalists, etc.)
 - Research and development institutions
 - Industrial base
 - Infrastructure, both physical (transit) and virtual
 - Legal and regulatory environments
 - Quality of life
 - Key networks (school districts, business, political, venture capital, etc.)
 - Business and policy culture
 - Others identified by the consultant
- 2) Facilitate the development of the Leadership Group which will:
 - a) represent the region's assets
 - b) consist of senior executive leadership representing critical partners/organizations, such as those mentioned in the introduction
 - c) collaborate in asset mapping and a critical self-assessment of the region
 - d) appropriately share financial and resource contributions to the partnership
 - e) provide products, tools, expertise, research, and other services
- 3) Provide guidance and assistance to the Leadership Group which will have the responsibility for:
 - a) determining each partner's role
 - i) While members of the Leadership Group *must* be at the senior executive level, subcommittees may consist of designees dedicated to participate.
 - b) conducting an economic and workforce analysis
 - c) determining the key questions the region will address
 - d) conducting a survey to measure asset networking
 - e) devising regionally-based and specific strategies that present potential to spur innovation in:

- Infrastructure
- Investment
- Talent development

E. PERIOD OF PERFORMANCE

The period of performance will be negotiated at time of award with the expectation it will not exceed six to eight months from the date of contract execution. The WorkPlace may approve a request for a no-cost extension for an additional period of time based on the success of the project and other relevant factors.

F. ELIGIBLE APPLICANTS

Respondents with a minimum of five or more years of experience in delivering services identified above are eligible to respond to this RFQ. Further, respondents must not be presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from entering into a transaction with any Federal Department or agency. Respondents should clearly indicate which services and activities they are qualified to provide.

G. INQUIRIES

The WorkPlace, Inc. will conduct a “Bidders Conference” for interested parties to make inquiries regarding this request. The conference will be held at the Bridgeport, Connecticut offices of The WorkPlace on the date specified below in the Schedule of Pertinent Events. Further, a conference-bridge for the Bidders Conference will be published on the WorkPlace website (www.workplace.org) prior to the conference.

Parties interested in responding to this RFQ should RSVP for the Bidders Conference by sending an email to the attention of Joyce Barclay at the address provided at the end of this section. Details about the conference will be provided with the reservation acknowledgement. Staff will be unable to answer questions about this RFQ after this conference unless they pertain specifically to apparent contradictions in the RFQ or the RFQ format. All respondents are asked to thoroughly read the entire RFQ prior to the conference.

Joyce Barclay
Manager of Strategic Initiatives
The WorkPlace, Inc.
350 Fairfield Avenue
Bridgeport, CT 06604
(203) 610-8520
Email: jbarclay@workplace.org

H. SCHEDULE OF PERTINENT DATES

Following is the proposed schedule for review of the proposals, selection of the firm and contract period. The WorkPlace, Inc. reserves the right to amend this schedule throughout the selection process if determined necessary.

RFQ Release Date	July 31, 2006
Proposers Conference	10:00 a.m., August 14, 2006
RFQ Due Date	2:00 p.m., August 25, 2006
Review Period	August 28 to September 8, 2006
Interview with finalist(s)*	Week of September 11, 2006
Contract Award	Week of September 18, 2006
Period of Performance	Six (6) to eight (8) months

*The top one or two proposers will be required to make available the individuals performing the day-to-day work of the project for an interview with the Evaluation Committee.

I. SUBMISSION OF PROPOSALS

All respondents must submit an original, seven (7) copies and one electronic copy (on either CD or floppy disk) of their proposal to:

The WorkPlace, Inc
Attention: Millie Brighindi
350 Fairfield Avenue
Bridgeport, CT 06604

Responses must be received no later than 2:00 p.m. (EST) on Friday, August 25, 2006. Responses received after the due date and time will not be considered. For purposes of this RFQ, postmarked date will not meet the requirements of being delivered.

No fax or e-mail submissions will be accepted.

J. SUBMISSION OF CONTENTS

Applicants shall use the content outline specified in this RFQ. Responses that do not comply with the submission requirements of this RFQ will not be considered.

a) Format

- i) Maximum length of responses for all instruction listed in this RFQ should be no greater than ten (10) double-spaced typed pages without attachments. Font size no smaller than 12 point and all margins (top, bottom, right and left) set at one inch.

- ii) Attachments are limited to schedules, resumes, Transmittal Form, any sub-contractor agreements, fee schedule, fee narrative, previous project/ reference information and samples of previous projects completed of similar scope.
- iii) Proposers may NOT bind proposals in any way (paper clips and clamps are acceptable). All extraneous material (including cover letters) or bindings will be removed prior to the review process.
- iv) To facilitate the review process, all proposal pages must be **numbered**. Please complete the enclosed Transmittal Form and submit it with your response.
- v) As proposals must be submitted unbound, the name of your organization must appear in the header or footer on each page.
- vi) Proposers may NOT submit extraneous material such as brochures or newspaper articles.

K. PROPOSAL REQUIREMENTS

1. Provide a brief description of qualifications with a brief list of similar types of consulting contracts successfully concluded. Include samples of work when appropriate.
2. Demonstrate your knowledge of international economic transformation systems and strategies (e.g., UK, India, Asia, Australia).
3. Name, title and resumes of principal(s) who will actually provide the service. If your proposal is selected, this individual will be required to attend an interview with the Evaluation Committee.
4. Services, data, equipment or facilities, if any, required from The WorkPlace.
5. Statement of services to be rendered, methodology and subcontractors, if any. If subcontractors are contemplated, provide the information required in K.1. through K.4. above for each.
6. Products or reports to be delivered, with delivery dates expressed in number of calendar days from authorized starting date.
7. Type of information, if any, to be collected, method of collection, and medium of resulting record (e.g., typed notes, tape recording, videotape, etc.), and proposed ownership of such records.
8. Provide a timeline outlining project activities
9. Total cost of project with a breakdown of how it was computed, including any travel expenses, and desired method of payment.
10. If consultant is not a citizen of the United States, explain consultant's status in the United States.

Note: The Table of Contents, relevant work samples, timeline, budget forms, resumes and

the reference list are not included in the ten (10) page proposal limit. Proposals that do not meet these requirements will not be considered.

L. EVALUATION CRITERIA

Each proposer will be evaluated against the following criteria to determine their capabilities of meeting the requirements of this proposal, in a manner most useful to the needs of *The WorkPlace, Inc.*, price and other factors considered.

- Proposer's ability to meet the requirements including time frames of this proposal. (20 points)
- Proposer's qualifications and prior experience, including three references from similar projects. (50 points)
- Cost of the project. (20 points)

M. SELECTION PROCESS

An Evaluation Committee will review and evaluate all responses submitted to this RFQ by applying the evaluation criteria listed in Section VIII. Committee members will individually read and evaluate each proposal then meet as a group to discuss their findings.

b) Oral Interviews

The top one or two respondents to this RFQ will be invited to participate in an oral interview by the Evaluation Committee. Respondents will be asked to describe and clarify their written submissions. Oral interviews will take place during September 2006.

c) Contractor Selection and Award

Upon completion of the review process, the Evaluation Committee will select a contractor. The WorkPlace Inc., which has received commitments of public funds to implement the activities in this RFQ, will negotiate contracts for services.

N. GENERAL INFORMATION

Notification of Award

- i) After the selection process is completed, all applicants will be notified of the acceptance or rejection of their responses.
- ii) The WorkPlace Inc., reserves the right to:
 - (a) Reject any and all responses to this RFQ;
 - (b) Select a response other than the lowest cost response;

- (c) Waive or modify minor irregularities in responses received;
- (d) Request further documentation in support of an applicant's response;
- (e) Postpone or cancel this RFQ or portions of it, at any time for any reason whatsoever.

Incurring Costs

- iii) The WorkPlace is not liable for any cost incurred by applicants in preparation for, or prior to, the approval of an executed contract. Additionally, no cost will be incurred by The WorkPlace for an applicant's participation in any pre-contract award activity.
- iv) By submitting a proposal, the applicant agrees that it will not make any claims for, or have any right to, damages because of any misinterpretation or misunderstanding of the specifications or because of any misinformation or lack of information.

Negotiable Items

Upon selection and successful completion of this RFQ process, applicants may be invited to negotiate a contract with The WorkPlace. The content of the selected applicant's proposal, together with a negotiated reimbursement plan, will be incorporated into and made a part of final contracts as developed by The WorkPlace.

Confidential and Proprietary Information

- i) The selected Contractor shall treat all information relating to the listed companies, which is obtained by it through its performance under this RFQ as confidential information to the extent that confidential treatment is provided under Connecticut and Federal law.
- ii) Proposals will be received and maintained consistent with applicable Connecticut open records laws. Due regard will be given to the protection of proprietary information contained in all proposals received. However, bidders should be aware that all materials associated with this procurement are subject to the terms of the Freedom of Information Act, the Privacy Act and all rules, regulations and interpretations resulting there from. It will not be sufficient for bidders merely to state generally that a proposal is proprietary in nature and therefore not subject to release to third parties.
- iii) Those particular pages which a bidder believes to be proprietary must be specifically identified as such. Convincing explanation and rationale to justify exception from release consistent with Section 1-19 of the Connecticut General Statutes must accompany the proposal. The rationale and explanation must be stated in terms of; 1) the prospective harm to the competitive position of the

bidder that would result if the identified material were to be released, and 2) the reasons why the materials are legally exempt from release pursuant to the above-cited statute. Rationale and explanation of the proprietary nature of all such pages or portions thereof, as described above, should be included as an attachment.

Contract Awards

Contracts awarded pursuant to this RFQ may be subject to additional requirements set forth by the State of Connecticut and/or U.S. Department of Labor, which are the sources of public funding for the services to be provided hereunder. Additionally, any and all awards are subject to the availability of funds provided by the U.S. Department of Labor.

All decisions made by The WorkPlace related to this RFQ shall be final.

The WorkPlace, Inc.

Transmittal Form

Please complete and return this page as a cover sheet for your proposal. Do not include a cover letter. All cover letters will be removed prior to the review process.

Date of Submission _____

Company Name: _____

Address: _____

Contact person on this RFQ:

Telephone: _____

Fax: _____

E-mail: _____

Web Site Address: _____

Signature: _____

Printed Name: _____

Title: _____

Qualifications and Statement of Services to be Provided

1. Provide a brief description of qualifications with a brief list of similar types of consulting contracts successfully concluded. Include samples of work when appropriate.
2. Demonstrate your knowledge of international economic transformation systems and strategies (e.g., UK, India, Asia, Australia).
3. Name, title and resumes of principal(s) who will actually provide the service. If your proposal is selected, this individual will be required to attend an interview with the Evaluation Committee.
4. Services, data, equipment or facilities, if any, required from The WorkPlace.
5. Statement of services to be rendered, methodology and subcontractors, if any. If subcontractors are contemplated, provide the information required in 1 - 4 above for each.
6. Products or reports to be delivered, with delivery dates expressed in number of calendar days from authorized starting date.
7. Type of information, if any, to be collected, method of collection, and medium of resulting record (e.g., typed notes, tape recording, videotape, etc.), and proposed ownership of such records.
8. Provide a timeline outlining project activities
9. Total cost of project with a breakdown of how it was computed, including any travel expenses, and desired method of payment.
10. If consultant is not a citizen of the United States, explain consultant's status in the United States.

11. **Proposer's Certifications**

1. To the best of proposer's knowledge, no officer, member, or other employee, or near relative of such person, holds a position of director, officer, or employee at The WorkPlace, Inc.
2. Proposer certifies that the rates and fees quoted herein are no higher than the rates and fees charged to other clients for similar work
3. Proposer agrees that this proposal will remain firm for a period of at least sixty (60) days from this date.
4. Proposer certifies that the information contained in this proposal, including any attachments, is true and correct to the best of his/her knowledge and belief.

Company Name: _____

Signature: _____

Printed Name: _____

Title _____

Date _____

Previous Project / Reference Information

Provide a minimum of three projects delivered by your organization that are of similar scope to this RFQ. These projects shall serve as your references. Each project summary should be no longer than two, double-spaced pages.

For each reference, provide the following information:

1. Entity Which Engaged Your Services
2. Street Address
3. City, State and Zip Code
4. Contact Person
5. Title
6. Telephone Number
7. Email Address
8. Website Address
9. Project Duration
10. Contract Amount
11. Project Objective
12. List of Deliverables
13. Summary of Services Provided/Activities Conducted

Fee Proposal Form

NAME OF RESPONDANT:		
BUDGET TOTAL:		
BUDGET CATEGORY	DESCRIPTION	REQUESTED AMT.
PERSONNEL		
NON-PERSONNEL EXPENDITURES		
CONTRACTUAL SERVICES		
OTHER		
TOTAL		\$

Fee Proposal Narrative

Please provide a concise explanation of how each budget line item was calculated.

PERSONNEL

Principal: 100 hours x \$30/hour=\$3,000

NON-PERSONNEL EXPENDITURES

Travel: 100 miles x .40/mi = \$40

CONTRACTUAL SERVICES

XYZ Consultant: 12 hours @ \$50/hour = \$600

OTHER

Explain the purpose of these funds.